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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE '84

WR 31-83

WASHINGTON, Aug. 3--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

AUSTRALIA's Wheat Board has announced a 1.5-million-ton wheat sale to China, the first since March 1982. This new contract is part of the current Australian-Chinese long-term supply agreement providing 1.5-2.5 million tons of wheat annually. Delivery of a significant tonnage of wheat is expected during the remainder of 1983 and a substantial portion will be delivered in the early months of 1984. An expected near-record Australian wheat crop makes additional sales to China in 1984 likely.

OILSEEDS AND PRODUCTS

The recently announced long-term supply agreement between the United States and the SOVIET UNION includes a reference to purchases of soybeans and soybean products for the first time. Under the terms of the agreement, purchases of 500,000 tons of soybeans and/or soybean meal could be used to reduce minimum purchase requirements for wheat and corn to 8 million tons from 9 million.

Including soybeans in the long-term agreement should lead to an increasing U.S. share of the Soviet soybean market. In addition, it sets the stage for U.S. entry into the rapidly expanding Soviet soybean meal market.

During the past 10 years, the Soviet Union has been an important, although widely fluctuating, market for U.S. soybeans. Data are as follows in 1,000 tons:

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LYNN KRAWCZYK, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Information Services staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

U.S. Soybean Exports
(Sept.-Aug. Marketing Year)

	Total	To USSR
1982/83	24,494 1/	199 2/
1981/82	25,285	683
1980/81	19,712	0
1979/80	23,818	813
1978/79	20,117	1,178
1977/78	19,061	744
1976/77	15,351	825
1975/76	15,107	310
1974/75	11,450	0
1973/74	14,673	18

1/ July estimate. 2/ Exports Sept.-May.

USSR - Soybean Meal Imports
(Calendar Year)

	Total	From U.S.
1983	2,600	0
1982	1,700	0
1981	1,000	0
1980	440	0
1979	52	27

DAIRY, LIVESTOCK AND POULTRY

In SWEDEN, greater profitability in egg production has led to a sizable surplus requiring greater subsidies for exports. According the U.S. agricultural attache in Stockholm, production in 1982 and 1983 is estimated near 2.1 billion eggs, compared with 1.9 billion in 1981, a year of better balance between production and demand. The larger expenditures reportedly have eliminated the reserves of the marketing agency and may force it to lower support prices for producers.

VENEZUELA may shift from an importer to an exporter of poultry meat during 1983 due to higher production. Following a 23-percent increase in 1982, Venezuelan poultry meat production is expected to increase 11 percent in 1983 to 360,000 tons, according to the U.S. agricultural counselor in Caracas. Expanding domestic demand resulting from favorable poultry prices relative to other meats is providing the stimulus for increased production.

SPAIN's pork production is expected to total 1.3 million tons, up 14 percent from 1982, according to the U.S. agricultural counselor in Madrid. This expansion follows a 9-percent increase in 1982 and is due to two years of favorable hog/feed price ratios. Preliminary indications are that pork production will level off in 1984.

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Spanish beef, sheep and goat meat production, in contrast, has shown little change since 1980 and is not expected to in 1984. Poor pasture conditions due to drought and disease problems, including foot and mouth disease, are the major reasons for the stagnation in this sector.

With hog cholera now under control and favorable hog/feed price ratios, KOREAN swine numbers are expected to expand 44 percent during 1983 reaching 3.15 million by year end, according to the U.S. agricultural counselor in Seoul. Pork production is expected to expand by 13 percent during 1983. Growth in 1984 is expected to be about half as much as in 1983 because producers are being encouraged by the government to reduce farrowing to avoid overproduction problems.

Cattle numbers this year are now projected to increase 14 percent due to both lower than expected slaughterings and to higher than projected live cattle imports. With more cattle, domestic beef production is expected to be up sharply in 1984.

COTTON AND FIBERS

In an effort to expand domestic textile production, EGYPT is investing \$244 million for modernizing and rehabilitating 30 government-owned textile mills. Particular emphasis is being placed on improving efficiency in the weaving, finishing and dyeing segments of the textile industry. Increased efficiency in these segments is expected to result in an expansion in the output of ready-made garments and a reduction in textile imports. Currently, 60 percent of domestic cloth output is sold as a coarse, semi-finished "popular cloth" through the public sector at subsidized prices.

MEXICO's 1983/84 cotton crop could reach 1.03 million bales, up 3 percent from last month's estimate and 24 percent above last year's level, according to the U.S. agricultural counselor in Mexico City. A crop of this size would still be well below preliminary expectations of a 1.3 million bale crop. A shortage of available irrigation water in Laguna, the high cost of inputs, and uncertainty concerning the new government's agricultural policy reduced plantings.

TOBACCO

MALAWI's flue-cured tobacco sales through July 14 totaled 15,271 tons at an average price of \$1.64 per kilogram. Approximately, 67 percent of the flue-cured crop had been sold as of that date. For the same period in 1982, 16,066 tons had been sold at an average price of \$2.46 per kilogram.

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Burley sales through July 14 totaled 16,866 tons with an average price of \$1.12 per kilogram. Under a new burley price support system, 3,497 tons have been sold at an average price of \$1.43 per kilogram. The low prices for flue-cured and burley in 1983 relative to 1982 reflect weak world demand and oversupply of both types of tobacco.

ARGENTINA reduced the export tax for unmanufactured tobacco from 25 to 10 percent, effective July 19. The measure will be in effect for a period of 180 days (until Jan. 15, 1984,) and is in response to the domestic tobacco sector's request to stimulate exports, which are reportedly sluggish and lagging behind last year's sales.

FRUITS AND VEGETABLES

Preliminary estimates by the FRENCH Ministry of Agriculture place the 1983/84 apple crop at 1,544,300 tons. This represents a 22-percent decline from the large 1982/83 outturn, reflecting the normal cyclical nature of the crop. Pear production is expected to reach 438,900 tons--3 percent above 1982/83--due to larger crops of both summer and fall pears in southwestern France.

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Selected International Prices

Item	: Aug. 2, 1983		: Change from : A year	
			: previous week : ago	
ROTTERDAM PRICES 1/				
Wheat:		\$ per MT	\$ per bu.	\$ per MT
Canadian No. 1 CWRS-13.5%.	13/ 203.00	5.52	+2.00	200.00
U.S. No. 2 DNS/NS: 14%...	183.00	4.98	+4.00	176.00
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	N.Q.
U.S. No. 2 S.R.W.....	164.00	4.46	+6.00	143.00
U.S. No. 3 H.A.D.....	201.00	5.47	+7.00	170.00
Canadian No. 1 A: Durum..	13/ 209.00	5.69	+2.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	162.00	4.11	+5.25	121.00
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	133.00
Feed Barley 3/.....	N.Q.	--	--	N.Q.
Soybeans and meal:				
U.S. No. 2 Yellow.....	290.00	7.89	+9.10	246.00
Brazil 47/48% SoyaPellets 4/	248.00	--	+4.00	217.00
U.S. 44% Soybean Meal.....	243.00	--	+6.00	211.00
U.S. FARM PRICES 5/				
Wheat.....	122.72	3.34	--	119.42
Barley.....	80.84	1.76	+1.38	79.00
Corn.....	127.55	3.24	-.40	97.33
Sorghum.....	117.04	5.31 6/	+4.63	87.30
Broilers 7/.....	1195.78	--	+23.81	N.A.
EC IMPORT LEVIES				
Wheat 8/.....	72.87	1.98	-20.29	107.70
Barley.....	75.22	1.64	-20.08	93.95
Corn.....	44.08	1.12	-13.90	99.05
Sorghum.....	66.60	1.69	-18.51	94.40
Broilers 9/.....	--	--	-- *	--
EC INTERVENTION PRICES 11/				
Common wheat(feed quality)	157.85	4.30	-2.88	172.36
Bread wheat.(min. quality)	174.25	4.74	-3.18	191.04
Barley and all other feed grains.....	157.85	--	-2.88	172.36
Broilers 11/.....	--	--	--	--
EC EXPORT RESTITUTIONS (subsidies)				
Wheat 12/.....	19.05	.52	-6.45	67.23
Wheat flour.....	N.Q.	N.Q.	N.Q.	N.Q.
Barley.....	38.12	.83	-10.35	53.84
Broilers 9/.....	--	--	--*	--
Sugar, refined	N.A.	N.A.	N.A.	N.A.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Twelve-city average, wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ F.O.B. price for R.T.C. broilers at West German border. 12/ Corrective amount Aug-Sept 40 ECU's. 13/ Sept. shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis August delivery. *Reflects currency fluctuation and not change in level set by EC.

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- Overseas markets and buying trends?
- New competitors and products?
- Trade policy developments?
- Overseas promotional activities?

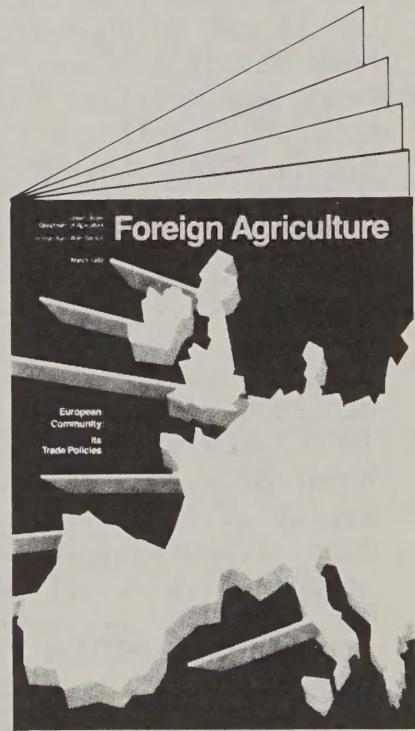
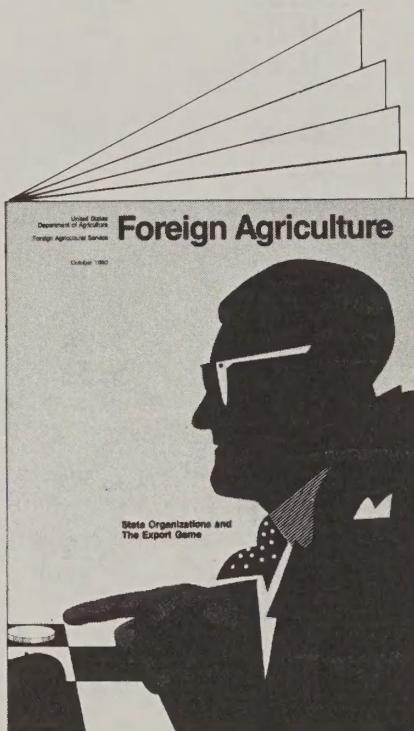
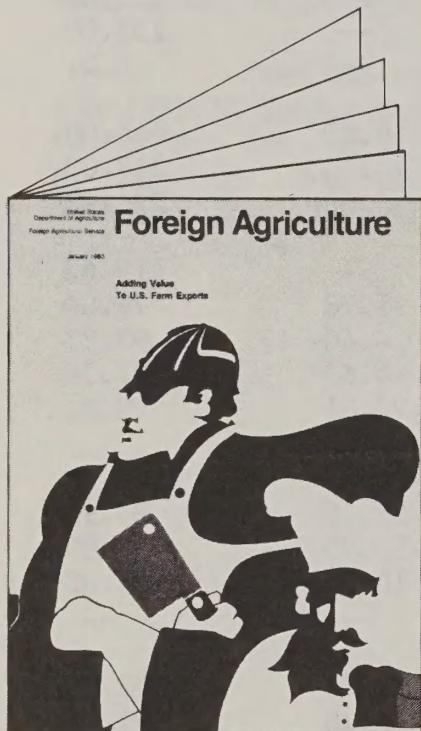
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World Coffee Situation	11	12	12	8	12
12	World Crop Production ¹	World Crop Production ¹	World Crop Production ¹	Horticultural Products Review	World Crop Production ¹
World Crop Production ¹	12	13	13	9	13
13	World Agricultural Supply/Demand ²	World Agricultural Supply/Demand ²	World Agricultural Supply/Demand ²	World Sugar & Molasses Situation	World Agricultural Supply/Demand ²
World Agricultural Supply/Demand ²	USSR Grain Situation/Outlook	USSR Grain Situation/Outlook	USSR Grain Situation/Outlook	10	USSR Grain Situation/Outlook
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			31		
			Agricultural Export Outlook ³		

All World Grain Situation/Outlook Circulars are available at 9:00 a.m. of the day designated. All other FAS circular reports listed above are available after 3 p.m. on the day of release from FAS Information Services Staff, Room 5918 South Building, U.S. Department of Agriculture, Washington, D.C. 20250. Telephone (202) 447-7937.

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